



COMDTINST M1080.10F  
14 DEC 04

COMMANDANT INSTRUCTION M1080.10F

Subj: MILITARY PERSONNEL DATA RECORDS (PDR) SYSTEM

1. PURPOSE. This Manual establishes policy and prescribes procedures for administering the Military Personnel Data Records (PDR) System, applicable to active duty and reserve forces, officers, and enlisted personnel.
2. ACTION. Area and district commanders, commanders of maintenance and logistics commands, commanding officers of headquarters units, assistant commandants for directorates, Judge Advocate General, and special staff offices at Headquarters (HQ) shall ensure compliance with the provisions of this Manual.
3. DIRECTIVES AFFECTED. Military Personnel Data Records (PDR) System, COMDTINST M1080.10E is canceled.
4. PROGRAM RESPONSIBILITY.
  - a. Commandant (G-WRI) is responsible for the Military PDR System and has delegated administration of the Coast Guard Personnel Command (CGPC) PDR system to Commander, Coast Guard Personnel Command (adm-3).
  - b. Units that submit electronic pay or personnel information are responsible for notifying members via their unit Commanding Officer of transactions submitted about them. Enclosure (2) of this Manual further explains this matter.

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	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	2	2	2	2	2	2	1	2	1	1		1	2	2	1	1	1	1	1		1					
B		5	10	1	12	2		10	2	2	2	4	2	10	1	1	2	17	1	2	2	1	10	1	1	1
C	2	2	2	1	2	2	2		1	1	2	1	2	1	1	1	1		2	1	1	1		1	1	
D	4	2	1	2	1	1	1	1	1	1			1				1		1	1		1		2	1	
E	1	6																						1		
F	2	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1		1	1						
G																										
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NON-STANDARD DISTRIBUTION:

5. CHANGES.

- a. Changes the name of PERSRU PDR to Servicing Personnel Office (SPO) PDR.
- b. Changes the name of HRSIC PDR to Personnel Service Center (PSC) PDR.
- c. Changes the name of the HQ PDR to Coast Guard Personnel Command (CGPC) PDR.
- d. Added requirement to file original Direct-Access Disciplinary Report in Part 2 of the SPO PDR with a copy sent to CGPC (adm-3) to be imaged and filed as an electronic image document in the CGPC PDR.
- e. Eliminates the requirement to file paper copies of the Computer-Generated marks sheet (CG-3306) in the SPO PDR.
- f. Added requirement to file original Designation of Beneficiaries (CGPSC-2020D) in Part 4 of the SPO PDR. Send copy to CGPC (adm-3). If a unit maintains a Unit PDR, file a copy of this form in Part 4 of the Unit PDR.
- g. Added requirement to file copy of the Family Subsistence Supplemental Allowance (FSSA) Application (CGPSC-2075) in Part 4 of the SPO PDR.
- h. Added requirement to file a copy of the Career Status Bonus (CSB) Election & Instructions (CGPSC-2426) in Part 2 of the SPO PDR.
- i. Added requirement to file the original Servicemember's Group Life Insurance (SGLI) Election and Certificate (SGLV-8286) in Part 4 of the SPO PDR. If a unit maintains a Unit PDR, file a copy of this form in Part 4 of the Unit PDR. Provide a copy to CGPC (adm-3) to be scanned as an EI document into the CGPC PDR.
- j. Added requirement to file the original SGLI Family Coverage Election and Certificate (SGLV-8286A) in Part 4 of the SPO PDR. If a unit maintains a Unit PDR, file a copy of this form in Part 4 of the Unit PDR. Provide a copy to CGPC (adm-3) to be scanned as an EI document into the CGPC PDR.
- k. Added requirement to file the member's **signed original** Government Travel Card (Individually Billed Account) Setup Form in Part 2 of the SPO PDR. If a unit maintains a Unit PDR, file a copy of the member's form in Part 4 of the Unit PDR.
- l. Added requirement to file the member's **signed original** Government Travel Card Program Recommendation/Acceptance Statement (enclosure (1) to The Travel Charge Card Program, COMDTINST 4600.14 (series)) in Part 2 of SPO PDR. If a unit maintains a Unit PDR, file a copy the member's form in Part 4 of the Unit PDR.

- m. Added in enclosure (2), examples of documents not authorized for imaging into the CGPC PDR.
  - n. Changed Medical Record disposition instructions.
6. PRIVACY ACT REQUIREMENTS. All personnel using or maintaining PDRs and preparing associated documents must maintain these records and documents' security and integrity at all times. Personnel must exercise care to ensure unauthorized disclosure does not occur and all records and documents are properly disposed of, specifically by shredding or other secure disposal methods. **Disposing of documents in daily trash is not proper disposal**. Recycling shredded material is authorized and encouraged. For additional information and requirements, see The Coast Guard Freedom of Information and Privacy Acts Manual, COMDTINST M5260.3 (series).
7. THE PDR SYSTEM.
- a. Background.
    - (1) Since its inception in March 1989, the PDR system continues to change as technology permits us to rely more on electronic data. Therefore, in June 1997, we announced that all HQ PDR's, which contained original paper documents, would transit to a HQ PDR (now the CGPC PDR) and contain only electronically scanned documents. Electronically Imaged (EI) data provides greater flexibility in data retrieval.
    - (2) PDR data frequently serves as the basis for determining Coast Guard responses to Personnel Records Review Board (PRRB), and Board for Correction of Military Records (BCMR) applications. Accordingly, documents sent to Commander, CGPC (adm-3) for electronic imaging should be the best possible copy of the original paper document.
  - b. Definition.
    - (1) The PDR System is the only system of military personnel records authorized for personnel documents, retrievable by a personal identifier. Enclosure (2) describes how to maintain each PDR.
    - (2) The PDR System retains **only** those specific military personnel records necessary to manage the Coast Guard's military workforce. Each of the following organizations maintains a PDR for each Coast Guard member:
      - (a) CG Personnel Command (CGPC) (electronically imaged data). Commander, CGPC (adm-3) maintains the CGPC PDR. The CGPC PDR contains only those electronically imaged documents that enclosure (3) authorizes. Commander, CGPC (adm-3) will destroy all **copies** of documents received, which are not authorized for imaging, the exception

are **all medical documents**, which will be returned to the appropriate addressee as noted in paragraph 7.b.(2)(e)3. Units should carefully check the list of authorized documents for imaging prior to forwarding any documents to Commander, CGPC (adm-3); see enclosures (1) and (3).

- (b) CG Personnel Service Center (PSC) (electronic data).
  - 1. The CG Personnel Service Center, Topeka, KS, maintains the PSC PDR database of personnel and pay data. Most of this data is stored in Direct-Access.
  - 2. The Service-wide Examination (SWE) Personnel Data Extract (PDE) is personnel information (Time In Grade (TIG), Time In Service (TIS), awards, courses, marks, exam board Operating Facilities (OPFAC), etc.) from the Direct-Access Database. PSC uses this personnel information to determine a member's eligibility to participate in the SWE and compute final multiples for advancement eligibility lists.
- (c) Servicing Personnel Office (SPO) PDR. The SPO PDR is designated as the member's official PDR; see enclosure (4).
- (d) Unit PDR. The Unit PDR is optional. Units maintaining personnel/pay and travel documents must file them in an official Personnel Data Record folder (CG-5354) only; see enclosure (5).
- (e) Medical Record.
  - 1. The Medical Manual, COMDTINST M6000.1 (series), prescribes how to maintain the Medical Record (CG-3443) also called the "Health Record".
  - 2. The SPO shall notify the record custodian of disposition information for members upon separation or transfer. Utilize enclosure (9) for disposition notification.
  - 3. Medical documents **are not** electronically imaged into the CGPC PDR. If **original or copies** of medical documents are received in error, CGPC (adm-3) will return them to the appropriate addressee.
- (f) National Personnel Records Center (NPRC), St. Louis, MO. The NPRC PDR is a consolidation of the member's CGPC PDR and the separations documents received from the member's SPO PDR. Commander, CGPC

(adm-3) combines these records and forwards to NPRC six months after the member's final separation.

c. PDR Description.

- (1) The Personnel Data Record (PDR) (CG-5354) is a four-part folder. The organization maintaining the PDR must be identified on the PDR folder's front cover, e.g., the SPO PDR will clearly indicate "**SPO PDR**". Identify personnel by name and EMPLID. SSNs shall no longer be recorded on the PDR folder.
- (2) Under no circumstances will any document not specified in this manual be filed in the CGPC PDR or SPO PDR. See the enclosures in this manual for more detailed information.

8. CORRECTING THE PDR.

a. General. Documents will be:

- (1) Corrected, added or removed from the CGPC PDR by CGPC (adm-3) only when authorized by Commandant (G-W), Commandant (G-WP), Commandant (G-WT), or Commander, CGPC (epm/opm/rpm) and the PRRB, or BCMR;
- (2) Corrected, added or removed from the SPO PDR only when supported by adequate documentation;
- (3) Corrected by Training Center, Cape May, NJ, for any recruit's Social Security Number, name, EMPLID, or birth date **recorded incorrectly**;
- (4) Corrected by the CG PSC for changes or corrections to name, SSN, EMPLID, birth date, or minority designator;
- (5) Corrected or removed only as Commander, CGPC (epm/opm/rpm) or Commandant (G-WT) authorize in all other cases not requiring administrative discretion;
- (6) Filed according to existing instructions when a new document replaces an existing one. For PDR purposes, file the new document in the same manner as the old one;
- (7) Processed as outlined in enclosure (6).

b. Amending documents contained in the PDR: A member may request the organization holding the record to amend his or her PDR information. The SPO will correct information within their scope when a responsible party, e.g. member, command, PSC, HQ or CGPC, so notifies and

provides necessary supporting documentation. If the SPO cannot effect the change, it will send the request to the cognizant authority for a determination. In all cases, the SPO must give the member a copy of the request for amendment or advise the member it has sent the request to a cognizant authority for determination.

9. RECOMMENDATIONS TO IMPROVE THE MILITARY PDR SYSTEM. Submit recommendations to improve the PDR system to Commandant (G-WRI) using enclosure (10). The PDR System is intended to provide a structured, yet flexible records system to meet the Coast Guard's continuing and diverse needs. Commandant (G-WRI) welcomes recommendations to improve this system.
10. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS. Environmental considerations were examined in the development of this directive and have been determined to be not applicable.
11. FORMS AVAILABILITY. Engineering Logistics Center Baltimore stocks the Personnel Data Record (PDR) (CG-5354); stock number 7530-01-GF3-0590; unit of issue is EA (each).

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Assistant Commandant for  
Human Resources

- Encl:
- (1) Table of Document Filing Locations
  - (2) Personnel Data Record (PDR) Guidelines
  - (3) Coast Guard Personnel Command (CGPC) PDR Structure
  - (4) Servicing Personnel Office (SPO) PDR Structure
  - (5) Unit PDR Structure
  - (6) Access to and Disclosing PDR Documents
  - (7) Disclosure Log
  - (8) Separation Documents Checklist
  - (9) Medical/Dental Record Disposition Instructions template
  - (10) Suggestions to Improve the Military PDR System

## TABLE OF DOCUMENT FILING LOCATIONS

The number after the letter designation indicates in which part of the SPO PDR or UNIT PDR to file the document. No location is given for electronically stored documents.

The first column, labeled with an “N”, denotes non-standard distribution. The notes at the end of this table contain additional information.

O = Original paper document  
 C = Paper copy  
 EI = Electronically stored imaged document  
 DB = Data Base (includes summary printouts)

N	DOCUMENT/TRANSACTION	CGPC		SPO PDR	UNIT PDR
		ENL	OFF		
	CG-2520	EI		O1	
	CG-2842	EI		O2	
N	CG-3029A				O1
	CG-3211 (series)	EI		O1	
	CG-3301	EI		O1	
	CG-3301A	EI	EI	O1	
	CG-3301B	EI		O1	
	CG-3301C	EI		O1	
	CG-3303	EI		C2	
N	CG-3303C (series)				O1
	CG-3304 (all)	EI	EI	O2	
	Court Memorandum Transaction Log (all)	EI	EI	O2	
	Direct-Access Disciplinary Report (all)	EI	EI	O2	
	CG-3306	DB			
	Employee Review Summary	DB			
	CG-3307 (all)	EI	EI	O2	C2
	CG-3453			O1	C4
	CG-3309	EI	EI		
N	CG-3698A				
	CG-3788A				
N	CG-3788B				

N	DOCUMENT/TRANSACTION	CGPC		SPO PDR	UNIT PDR
		ENL	OFF		
N	CG-3788C				
	CG-3822	EI	EI	O2	
	CG-3853			C4	
	CG-4082	EI	EI		
	CG-4170A	EI	EI	O4	C4
	CG-4175A			C2	
	CG-4328D		EI		
	CG-4671			C2	
	CG-4714	EI	EI		
	CG-4916	EI	EI	C1	
	CG-5131			C4	
	CG-5209			O3	
	CG-5274				O3
	CG-5286			O2	C1
N	CG-5310 (series)		EI		
	CG-5311		EI		
	CG-5312		EI		
	CG-5313		EI		
	CG-5314		EI		
	CG-5315		EI		
	CG-5315A		EI		
	CG-5316		EI		
	CG-5317		EI		
	CG-5411	EI	EI	O1	
	CG-5412	EI	EI	O2	
N	CG-5525			C1	C4
N	CG-5588	EI	EI		C3
	CG-9556		EI	O1	
	CGHQ-2511B	EI	EI	C2	
	CGHQ-3433	EI	EI		
	CGHQ-4290	EI	EI	C2	
	CGHQ-4717	EI	EI	C2	
	CGHQ-4973	EI	EI		



Enclosure (1) to COMDTINST M1080.10F

N	DOCUMENT/TRANSACTION	CGPC		SPO PDR	UNIT PDR
		ENL	OFF		
	CGHSIC-1071	EI	EI	O2	
	CGHSIC-1072	EI	EI	O2	
	CGHSIC-1075	EI	EI	C2	
	CGHSIC-2075			C4	
	CGHSIC-2426	EI	EI	C2	
	CGHSIC-4700 (series)	EI	EI	C4	
	CGPSC-2020D	EI	EI	O4	C4
	CGPSC-2075			C4	
	CGPSC-2426	EI	EI	C2	
	CGPSC-4700 (series)	EI	EI	C4	
	DD-4 (with annexes)	EI	EI	O1	
	DD-108	EI	EI		
	DD-214	EI	EI	C1	
	DD-215	EI	EI	C1	
	DD-368	EI	EI	O1	
	DD-553	EI	EI	O2	
	DD-1172			C4	
	DD-1882	EI	EI		
	DD-1883	EI	EI		
	DD-1966	EI		O1	
	DD-2058CG			O3	
N	DD-2366	EI	EI	O2	
N	DD-2366-1	EI	EI		
	DD-2384-1	EI	EI	O2	
	DD-2494			C3	
	DD-2494-1			C3	
	DD-2648	EI	EI	O1	
N	SF-312				C3
	SF-1199A				
	SGLV-8285	EI	EI	O4	
	SGLV-8286	EI	EI	O4	C4
	SGLV-8285A	EI	EI	O4	
	SGLV-8286A	EI	EI	O4	C4
	OPNAV 5510/413	EI	EI		C3
N	VA-21-3101	EI	EI		
	Active Duty Agreements	EI	EI	O1	
	Application For Direct Commission	EI	EI		

N	DOCUMENT/TRANSACTION	CGPC		SPO PDR	UNIT PDR
		ENL	OFF		
N	Award Citations	EI	EI	C3	
N	Government Travel Card (Individually Billed Account) Setup Form (Mbr's initial submission only)			O2	C4
N	Government Travel Card Program Recommendation/Acceptance Statement (Mbr's initial submission only)			O2	C4
	<b>Boards</b>				
	Administrative Discharge	EI		C2	
	BCMR decisions	EI			
	MED/PE	EI		C2	
	PRRB decisions	EI			
	DNA Tracking for Prisoners	EI	EI		
	Disclosure Log			O2	O4
	Educational Transcripts/GED results	EI	EI		
	Entire separation package when CGPC, MLC, District, TRACEN Cape May, or CG Academy directs separation	EI	EI	O1	
	<b>Letter(s) of/for authorization:</b>				
	Alcohol Incident	EI	EI	O2	
	Appointment	EI	EI	O1	
N	Course Completion			O2	
N	Designation			O2	
N	Request for Advance/Restoration/Rate Change, Removal of Designator, or Promotion	EI	EI		
	Designation as CG Aviator	EI	EI		
	Designation as Law Specialist	EI	EI		
	Integration/Extension	EI	EI	C1	
	Non-Selection/Lock-in	EI	EI	C2	
	Obligating Service	EI	EI	C1	
	Removal/Relief for Cause (Ltr/CG-3307)	EI	EI	C2	
	Weight Compliance (Ltr/CG-3307)	EI	EI	C2	

N	DOCUMENT/TRANSACTION	CGPC		SPO PDR	UNIT PDR
		ENL	OFF		
	27-Point Screen	EI	EI	C2	
	20 Years Service	EI	EI	C2	
	Officer Promotion Auth. List (OPAL)			C2	
	<b>Orders:</b>				
	Recall	EI	EI	C1	
	Separation/Retirement	EI	EI	C1	
	Personnel Data Info File (PDIF)			DB/C4	DB/C4
	Punitive Letters	EI	EI		
	<b>Report(s) of:</b>				
	Civil arrest letter	EI	EI		C2
	Reserve Point Statements—Other Service			C2	
	Summary Sheet	EI			

**Note:** Many forms listed above have become obsolete, e.g., CG-3303, CG-3304, CG-3309, CGHQ-2511B, CGHQ-4290, CGHQ-4717, CGHSIC-1071, CGHSIC-1072, CGHSIC-1075, CGHSIC-2075, CGHSIC-2426, CGHSIC-4700 (series), OPNAV-5510/413, and the Court Memorandum Transaction Log. Though no longer authorized for use, retain the original paper or imaged document in their current location for historical purposes.

Non-standard distribution notes

CG-3029A	If the unit does not maintain a Unit PDR, file in Part 2 of the SPO PDR.
CG-3303C (series)	If the unit does not maintain a Unit PDR, the unit CO or OINC retains.
CG-5310 (series)	CGPC (adm-3) enters original OERs into electronic imaging system and then mails them to the Reported on Officer.
CG-5525	File a copy of this form in the SPO PDR until the member's military obligation is completed or the member is assigned to a Selected Reserve (SELRES) billet, whichever occurs first.
DD-2366	File original in Part 2 of the SPO PDR; send copy to CGPC (adm-3) for electronic imaging into CGPC PDR; give second copy to member.

Enclosure (1) to COMDTINST M1080.10F

DD-2366-1	File original in Part 2 of the SPO PDR; send copy to CGPC (adm-3) for electronic imaging into CGPC PDR; give second copy to member
SF-312/CG-5588	Send original to G-CFI in Chesapeake, VA with a copy to CGPC (adm-3); include CG-5588 as a source Document. File properly executed SF-312 with the CG-5588 attached in Part 3 of the Unit PDR, if Unit PDR is not keep file in Part 2 of SPO PDR
Award Citations	Only personal and unit awards (with member's EMPLID in the upper right corner of the citation) requiring entry into Direct-Access are to be forwarded to the SPO handling the member's PDR. Send a copy of the award to CGPC (adm-3) for imaging. A complete listing of awards to be filed/imaged is located in the Personnel and Pay Procedures Manual, PSCINST M1000.2 (series). The award citations are filed in Part 3 of the SPO PDR as temporary documents until processed.
Government Travel Card (Individually Billed Account) Setup Form	Effective January 1, 2004 file the member's signed original Government Travel Card Setup Form in Part 2 of the SPO PDR. Units that maintain a Unit PDR will send the signed original form to their SPO for filing and place a copy in Part 4 of the Unit PDR.
Government Travel Card Program Recommendation/Acceptance Statement	Effective January 1, 2004 file the member's <u>signed original</u> form found in Enclosure (1) to the Travel Card Program, COMDTINST 4600.14 (series) in Part 2 of the SPO PDR. Units that maintain a Unit PDR will send the signed original form to their SPO for filing and place a copy in Part 4 of the Unit PDR.
Letter of Designation/Course Completion	If another PDR entry does not support Letter of Designation and Course Completion information or the Coast Guard does not track it electronically in a personnel information system, file in the appropriate PDR section. <u>Example:</u> Do not file Letter of Designation as OINC in the PDR; Direct-Access should reflect the appropriate enlisted qualification code for the member. Do not file CG Institute course completion information in the PDR; the Institute records it electronically and provides the member a completion letter.
Request for Advance/Restoration/Rate Change, Removal of Designator, Promotion	Send these requests to Commander, CGPC (epm-1) for final a decision.

## **PERSONNEL DATA RECORD GUIDELINES**

1. Opening a Personnel Data Record (CG-5354).
  - a. These accession entry commands will open the SPO PDR for each member who enters the Coast Guard or Coast Guard Reserve:
    - (1) Academy for cadets and Officer Candidate School (OCS);
    - (2) Training Center Cape May for recruits;
    - (3) SPO for members (direct shippers) reporting directly from any other location not listed in 1.a.(1)-(2) above.
  - b. If a member's service is continuous and the SPO PDR is still serviceable, a new SPO PDR does not need to be opened upon reenlistment, extension, integration, etc.
  - c. When a former Coast Guard or Coast Guard Reserve member re-enters active duty, the PSC must retrieve from the National Personnel Records Center the NPRC PDR to validate pay base dates. PSC will then send the NPRC PDR to CGPC (adm-3), who will make electronic images of all necessary documents. CGPC (adm-3) will then send the NPRC PDR to the SPO to reestablish the members SPO PDR.
  - d. When a Coast Guard Reserve enters on Extended Active Duty (EAD) or reenlists in the regular Coast Guard, the SPO will send the member's SPO PDR to their new SPO and direct the health record custodian to forward the medical PDR to the new unit.
2. Maintaining the PDR.
  - a. The CGPC PDR is maintained electronically by CGPC (adm-3) as computer images. Units shall submit to CGPC (adm-3) the **best possible copy** of original documents for imaging into the electronic imaging system. The CGPC PDR filing structure is outlined in enclosure (3).
    - (1) When CGPC (adm-3) receives authorized documents to image, they shall complete the imaging process (scan, QC, index). Copies of documents received by CGPC (adm-3), which are not authorized for imaging, will be shredded in accordance with the Coast Guard Freedom of Information and Privacy Acts Manual, COMDTINST M5260.3 (series). The exception are **medical documents**, which if received in error, CGPC (adm-3) will return them to the appropriate addressee.

- (2) The following are some examples of **documents not authorized to be imaged** into the CGPC PDR:
- (a) Designation Letters, “unit specific,” (except CG Aviator/Law Specialist);
  - (b) Correspondence Course Completion Letters;
- b. The SPO PDR filing structure is outlined in enclosure (4). Do not remove any Reservist’s documents from a PDR when he or she reports to active duty for any period.
- c. The Unit PDR is optional. Each command will decide whether to maintain Unit PDRs. This manual does not authorize units not maintaining PDRs to subsequently shift additional work to another unit nor does it change command responsibilities. The Unit PDR structure is outlined in enclosure (5). Units may file copies of other documents not listed in enclosure (5) in the Unit PDR at the discretion of the Commanding Officer or Officer In Charge. Unit PDRs can vary, depending on what the Commanding Officer or Officer In Charge deems necessary. Commands that decide to maintain a Unit PDR shall make sure all personnel, pay or travel documents are filed in a PDR Folder (CG-5354) with the words “**Unit PDR**” clearly noted on the front cover. Commands are not authorized to retain any personnel, pay, or travel documents on a member in their unit command files whatsoever.
- d. The CGPC PDR and SPO PDR shall contain only the documents prescribed by this manual and filed in their designated parts of the PDR folder. The directives requiring PDR documents and transactions also contain directions for completing these documents. Address unresolved questions to CGPC (adm-3). File in the SPO PDR only the original or best available copy, depending on the required distribution, of any document. Commands sending copies of documents to CGPC (adm-3) for imaging should ensure that those documents are clean, whole, and the most legible, complete copy available.
- e. File all PDR documents in the order listed, top to bottom, **by form type** chronologically within each part; e.g., file all CG-3307s together in the appropriate part with the latest date on the top, and the oldest date on the bottom. The **only** exception to this is in Part 1 of the SPO PDR: file these documents chronologically, with the oldest document on the bottom, and most recent document on the top, **regardless of form type**.
- f. One of this manual’s objectives is to eliminate the duplication of records. Commands co-located with their own SPOffice are not expected to maintain a Unit PDR; however, if these units decide to do so, they should not duplicate any SPO PDR documents in the Unit PDR.

3. Transmitting the PDR on Permanent Change of Station (PCS) Transfer.
  - a. SPO PDR. Within 5 working days after a member's departure date send the SPO PDR via regular mail to the new SPO. **Hand carrying of the SPO PDR or using registered, certified, or express shipments is not authorized.** If the new SPO is "unknown", contact the member's new unit to inquire as to which SPO maintains their SPO PDRs. If a SPO receives a SPO PDR in error, they should forward the PDR within 2 working days of receipt to the correct SPO.
  - b. Unit PDR. **Hand carrying the Unit PDR is authorized and encouraged** to help reduce mailing costs. If a member elects not to hand carry the Unit PDR or the Commanding Officer or Officer In Charge directs mailing it, the field unit will send the Unit PDR to the member's new field unit via regular mail within 5 working days after a member's departure date. **Using registered, certified, or express mail is not authorized.** If the new field unit does not maintain Unit PDRs, it may give the Unit PDR to the member. Persons releasing information from this record will make appropriate disclosure log entries when necessary.
  - c. Missing PDR. In either case, if the new field unit or new SPO does not receive the Unit PDR or SPO PDR within 5 working days after the member reports, they should contact the member's previous field unit or previous SPO as applicable to locate the missing PDR.
4. Transmitting the SPO PDR when Assigned TDY, ADSW-AC or ADSW-RC or Reservist Mobilized under Title 10 or Title 14.
  - a. For Temporary Duty (TDY), Active Duty for Special Work In Support of the Active Component (ADSW-AC) or Active Duty for Special Work In Support of the Reserve Component (ADSW-RC) and Reservist Mobilized under Title 10 or Title 14, for more than 60 days, the SPO PDR forwarding requirements described in 3.a. above apply. When sending a member's SPO PDR to another SPO, direct coordination between both SPOs is important.
  - b. For TDY, ADSW-AC, or ADSW-RC and Reservist Mobilized under Title 10 or Title 14, for less than 60 days, the member's permanent SPO will retain and maintain the SPO PDR.
5. PDR Review.
  - a. SPOs must afford Commanding Officers and their authorized officials, e.g., Executive Officer, Department Heads, Personnel Officer, etc., an opportunity to review the SPO PDR and copy any documents needed to carry out their responsibilities. The SPO and unit Commanding Officer will determine how to accomplish this. Any person requesting information from the SPO PDR on a member will make the appropriate disclosure log entries as required by enclosure (7).

- b. Record custodians must review the SPO PDR and Unit PDR to ensure the information collected and used to administer our personnel programs is correct. **It is highly desirable to conduct these reviews jointly with the member.** These reviews must include at least these actions: screening for misfiled or temporary documents, identifying incorrect information; or other requirements to update various documents and transactions, e.g., BAH/Dependency Form (CG-4170A). Review the SPO PDR on:
  - (1) Reenlistment;
  - (2) PCS departure or arrival;
  - (3) Discharge and appointment to warrant officer;
  - (4) From temporary to permanent commissioned status,
  - (5) On reporting for TDY longer than 60 days;
  - (6) Two years since last review.
- c. Temporary Documents. A “temporary” document filed in Part 3 of the SPO PDR is an official document that:
  - (1) Changes or is replaced monthly or quarterly;
  - (2) Has been superseded by a later similar document or whose action no longer pends;
  - (3) Has been reflected in a member's;
    - (a) Monthly Leave and Earnings Statement (LES), except the BAH/Dependency Form (CG-4170A) transactions;
    - (b) Change in status;
    - (c) Other official documents retained or a matter of record.
  - (4) At the SPOs the Direct-Access software applications replaced SDA II. The basis for recording transactions and events in Direct-Access are worksheets, message traffic, e-mail, letters, or other correspondence with any supporting documentation. Direct-Access screen prints or other source documents identified above become “temporary” documents; the SPOs shall retain these documents in Part 3 of the SPO PDR until they have been posted or are superseded by a later “temporary” document.
  - (5) The SPOs shall remove “temporary” documents and transactions from the SPO PDR after they have served their purpose, and destroy them unless the member specifically requests them.



- (6) Purging documents such as Court Memorandums or the Direct-Access Disciplinary Report and any other types of derogatory information is unlawful. These are considered “**permanent**” documents and shall be maintained unless official policies, regulations, or Commander, CGPC, PRRB, or BCMR directs removal.

6. Terminating PDR Maintenance.

- a. Discontinue maintaining a PDR for any of the following reasons:
  - (1) Discharge without immediate enlistment or reenlistment in the Reserves.
  - (2) Retirement, including RET-1 and RET-2 for Reserves.
  - (3) Missing, including those Coast Guard members determined absent in a status of:
    - (a) Missing in action;
    - (b) Interned in a foreign country;
    - (c) Captured, beleaguered, or besieged by a hostile force;
    - (d) Involuntarily detained in a foreign country;
    - (e) Desertion as described in Article 8, Coast Guard Personnel Manual, COMDTINST M1000.6 (series);
  - (4) Death

7. Disposing of PDRs.

- a. For members who are **Retired** or are **Discharged** without immediate reenlistment, or enlistment in the Coast Guard Reserve:
  - (1) The unit must send all **original** documents from the member’s Unit PDR, e.g., Performance Qualifications (CG-3303C (series)), to the SPO within 2 working days after the member separates. The unit shall give the member the remainder of the Unit PDR and his or her separation documents, e.g., Certificate of Release or Discharge from Active Duty (DD-214), Honorable Discharge Certificate (DD-256CG), etc.
  - (2) The SPO must send all **original** documents from the member’s SPO PDR to CGPC (adm-3) per the Separation Checklist in enclosure (8) within 5 working days after separation ensuring the package contains all **original** documents received from the member’s Unit PDR. **DO NOT** send the

member's SPO PDR folder to CGPC (adm-3) and give the member the rest of the SPO PDR.

- (3) The SPO shall notify the health record custodian to forward the health record to the Veterans Affairs Records Management Center, with a photocopy of the final Certificate of Release or Discharge from Active Duty (DD-214) copy 2. Enclosure (9) is provided to aid in notification.
- (4) Upon receipt of the separation documents Commander, CGPC (adm-3) will:
  - (a) Print all the member's imaged documents and establish the CGPC PDR;
  - (b) Consolidate the CGPC PDR with the separation documents from the SPO PDR to form the NPRC PDR, which should contain only the original or one copy of PDR documents;
  - (c) Maintain this consolidated NPRC PDR at CGPC for six months after separation. After six months, send the NPRC PDR to the National Personnel Records Center (NPRC), in St. Louis, MO, for storage;
- b. For members who affiliate with the **Coast Guard Selective Reserve (SELRES)** via Release from Active Duty (RELAD) or immediate enlistment after discharge from active duty:
  - (1) The unit must send all **original** Unit PDR documents, e.g., Performance Qualifications (CG-3303C (series)); to the member's SPO within 2 working days after the member affiliates. The unit shall give the member the remainder of the Unit PDR and his or her separation documents, e.g., Certificate of Release or Discharge from Active Duty (DD-214), etc.
  - (2) The SPO must send the required separation documents to Commander, CGPC (adm-3) per the Separation Checklist in enclosure (8) within 5 working days after affiliation. Send the SPO PDR of a member assigned to the SELRES to the new SPO for the member's new assigned unit.
  - (3) The SPO shall direct the health record custodian to forward the health record to the member's new assigned unit per the Medical Manual, COMDTINST M6000.1 (series). Enclosure (9) is provided to aid in notification.
- c. For members who affiliate with the **Coast Guard Individual Ready Reserve (IRR)** via Release from Active Duty (RELAD):
  - (1) The unit must send all **original** Unit PDR documents, e.g., Performance Qualifications (CG-3303C (series)), to the SPO within 2 working days after the member separates. The unit shall give the member the remainder of the

Unit PDR and his or her separation documents, e.g., Certificate of Release or Discharge from Active Duty (DD-214), etc.

- (2) The SPO must send the required separation documents to Commander, CGPC (adm-3) per the Separation Checklist in enclosure (8) within 5 working days after affiliation.
  - (3) The SPO shall send the SPO PDR of a member assigned to the IRR to CGPC (rpm-2) within 5 working days of affiliation with copies of the following documents:
    - (a) Certificate of Release or Discharge from Active Duty (DD-214)
    - (b) Employee Review Summary
    - (c) Separation Orders in Direct-Access
  - (4) The SPO shall direct the health record custodian to forward the health record to CGPC (rpm-2) per the Medical Manual, COMDTINST M6000.1 (series). Enclosure (9) is provided to aid in notification.
- d. On determining a member is a deserter:
- (1) The unit must send the Unit PDR to the SPO within 2 working days after a member is declared a deserter.
  - (2) The SPO must send the Unit PDR, and SPO PDR to CGPC (adm-3) within 5 working days after member is declared a deserter. CGPC (adm-3) who will consolidate the PDRs and maintain the file.
  - (3) The SPO shall direct the health record custodian to forward the health record to CGPC (adm-3) per the Medical Manual, COMDTINST M6000.1 (series). Enclosure (9) is provided to aid in notification.
- e. When a member dies:
- (1) The unit must send the Unit PDR to the SPO within 2 working days after a member dies.
  - (2) The SPO must send the Unit PDR, and SPO PDR to CGPC (adm-3).
  - (3) The SPO shall direct the health record custodian to forward the health record to CGPC (adm-3) per the Medical Manual, COMDTINST M6000.1 (series). Enclosure (9) is provided to aid in notification.

8. Lost PDRs. The SPO will reconstruct the SPO PDR and if necessary request copies of documents maintained in the CGPC PDR from CGPC (adm-3). If a Unit PDR held by a unit is lost and must be reconstructed, the unit should request copies of documents from their SPO. If documents are not available in the SPO PDR the SPO on behalf of the unit will request copies of documents from CGPC (adm-3).

## **CG Personnel Command (CGPC) PDR Structure**

CG-2520	Application for Enlistment
CG-2842	Notification of Removal of Absentee Wanted Notice
CG-3211	Officer Candidate School Agreement (No Prior Military Service)
CG-3211A	Officer Candidate School Agreement (Former member of CG or other Armed Forces)
CG-3211B	Officer Candidate School Agreement (Enlisted Member of the CG or CG Reserves)
CG-3211C	Officer Candidate School Agreement between USA, DOT, USCG (Chief Warrant Officer)
CG-3301	Enlistment Contract – USCG
CG-3301A	Statement of Understanding (original CG enlistment)
CG-3301B	Agreement to Extend/Reextend Enlistment
CG-3301C	Discharge and Reenlistment Contract
CG-3303	Achievement Sheet
CG-3304	Court Memorandum, SDA II transaction log printout or Direct-Access Disciplinary Report
CG-3306	Marks
CG-3307	Administrative Remarks (all)
CG-3309	Record of Discharge, Release from Active Duty, or Death
CG-3822	Injury Report for not misconduct and in-line of duty determination (FPL)
CG-4082	Officer Education Record (05/77)
CG-4082	Record of Professional Development (09/98)
CG-4170A	BAH/Dependency Form
CG-4328D	Report on the Fitness of Admirals
CG-4714	Reserve Points from Previous Service
CG-4916	Active Duty Initial Information Form
CG-5310	Officer Evaluation Report (OPR/OER)—CAPT
CG-5311	Officer Evaluation Report (OPR/OER)—CDR
CG-5312	Officer Evaluation Report (OPR/OER)—LCDR
CG-5313	Officer Evaluation Report (OPR/OER)—LT
CG-5314	Officer Evaluation Report (OPR/OER)—LTJG
CG-5315	Officer Evaluation Report (OPR/OER)—ENS
CG-5316	Officer Evaluation Report (OPR/OER)—CWO
CG-5317	Officer Evaluation Report (Reserve Officer 6-29 days)
CG-5311	Officer Evaluation Report (OER)—Level I (Rev. 12/88, 5/92)
CG-5312	Officer Evaluation Report (OER)—Level II (Rev. 12/88, 5/92)
CG-5313	Officer Evaluation Report (OER)—CAPT (Rev. 12/88, 5/92)
CG-5411	Statement of Understanding (SELRES GI Bill)
CG-5412	Termination/Recoupment Data (SELRES GI Bill)
CG-9556	Acceptance and Oath of Office
CGHQ-2511B	Statement of Creditable Service or equivalent document(s)

Enclosure (3) to COMDTINST M1080.10F

CGHQ-3433	Statement of Service—Retired Personnel
CGHQ-4290	Transcript of Sea Service or equivalent
CGHQ-4717	Statement of Service or equivalent
CGHQ-4973	Computation of Retirement Point Credits
CGHSIC-1071	Statement of Creditable Service
CGHSIC-1072	Statement of Creditable Sea Service
CGHSIC-2426	Career Status Bonus (CSB) Election
CGHSIC-4700	Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Plan Election
CGPSC-1071	Statement of Creditable Service
CGPSC-1072	Statement of Creditable Sea Service
CGPSC-2020D	Designation of Beneficiaries
CGPSC-2426	Career Status Bonus (CSB) Election
CGPSC-4700	Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Election
DD-4	Enlistment/Reenlistment Document, Armed Forces of the United States
DD-108	Application for Retired Pay Benefits
DD-214	Certificate of Release/Discharge from Active Duty
DD-215	Correction to DD-214, Armed Forces of the U.S. Report of Transfer or Discharge
DD-368	Request for Discharge or Clearance from Reserve Component
DD-553	Deserter/Absentee Wanted by the Armed Forces
DD-1882	Survivor Benefit Plan Election Change
DD-1883	Survivor Benefit Plan - Election Certificate
DD-1966	Record of Military Processing – Armed Forces of the United States
DD-2366	Montgomery GI Bill Act of 1984 (MGIB)(May 90)
DD-2384-1	Notice of Basic Eligibility (NOBE)(Nov 91)
DD-2648	Pre-separation Counseling Checklist
OPNAV 5510/413	Personnel Security Action Request
SGLV-8285	Request for Insurance (SGLI)
SGLV-8286	SGLI Election
SGLV-8286A	SGLI Family Coverage Election and Certificate
VA-21-3101	VA Claim (request for information)
---	Active Duty Agreements
---	Administrative Discharge Boards
---	Application for Direct Commission
---	Award Citations
---	Board for Correction of Military Records (BCMR)
---	Disclosure Log
---	Educational Transcripts
---	Entire separation package if CGPC, MLC, District, TRACEN Cape May, or Superintendent CGA directed separation
---	GED results
---	Letter of Alcohol Incident

--- Letters of Appointment  
--- Letter of Designation as CG Aviator/Law Specialist  
--- Letters of Integration/Extension  
--- Letters of Non-Selection/Lock-in  
--- Letters obligating service  
--- Letters/CG-3307 Removal/Relief for Cause  
--- Letter for 27-Point Screening  
--- Letter for 20 Years' Service  
--- Personnel Record Review Boards (PRRB)  
--- Physical Evaluation (PE) Boards  
--- Punitive Letters  
--- Recall Orders  
--- Report of Civil Arrest  
--- Report(s) of Civil Conviction  
--- Report of Investigation  
--- Request for Advancement/Restoration/Change in Rate, Removal of  
--- Designator, Promotion  
--- Separation/Retirement Orders from Direct Access  
--- Summary Sheet  
--- TRACEN Cape May Recruit Personnel  
--- Weight Compliance (Letter)





## **Servicing Personnel Office (SPO) PDR Structure**

### **Part 1: Accession and Separation(s)**

**File chronologically, with the oldest documents on the bottom and the newest on top.**

CG-2520	Application for Enlistment
CG-3211 (series)	Officer Candidate School Agreement
CG-3301	Enlistment Contract
CG-3301A	Statement of Understanding
CG-3301B	Agreement to Extend/Reextend Enlistment
CG-3301C	Discharge and Reenlistment Contract
CG-3453	Request for Reserve Orders
CG-4916	Active Duty Initial Information Form
CG-5411	Statement of Understanding (SELRES GI Bill)
CG-5525	CG Reserve Assignment Request and Orders
CG-9556	Acceptance and Oath of Office
DD-4	Enlistment/Reenlistment Document, Armed Forces of the United States
DD-214	Certificate of Release or Discharge from Active Duty
DD-215	Correction to DD-214, Armed Forces of the U.S. Report or Transfer of Discharge
DD-368	Request for Discharge or Clearance from Reserve Component
DD-1966	Record of Military Processing – Armed Forces of the United States
DD-2648	Pre-separation Counseling Checklist
---	Active Duty Agreements
---	Appointment Letters
---	Integration/Extension Letters
---	Letters Obligating Service
---	Recall Orders
---	Separation/Retirement Orders from Direct Access

### **Part 2: Career Documentation**

(Top) ---	Disclosure Log (see enclosures (6) and (7) for instructions)
CG-2842	Notice of Removal of Absentee Wanted Notice
CG-3029A	Individual Record of Small Arms Training. (File only if Unit PDR not kept by unit).
CG-3303	Achievement Sheet
CG-3304	Court Memorandum
----	Transaction Log Printout from SDA II
----	Direct-Access – Disciplinary Report (all)
CG-3307	Administrative Remarks (all)
CG-3822	Injury Report for not misconduct and in-line of duty determination
CG-4175A	Annual Reserve Retirement Point Statement (current only)
CG-4671	Disability Orders & Notification of Eligibility for Disability Benefits

## Part 2: Career Documentation (cont'd)

CG-5286	Class A School Training Request (remove on orders to "A" school)
CG-5411	Statement of Understanding (SELRES GI Bill)
CG-5412	Termination/Recoupment Data (SELRES GI Bill)
CG-5588	Personnel Security Action Request (Rev. 6/98)
CGHQ-2511B	Statement of Creditable Service
CGHQ-4290	Transcript of Sea Service
CGHQ-4717	Statement of Service
CGHSIC-1071	Statement of Creditable Service
CGHSIC-1072	Statement of Creditable Sea Service
CGHSIC-1075	Transcript of Sea Service
CGHSIC-2426	Career Status Bonus (CSB) Election & Instructions
CGPSC-2426	Career Status Bonus (CSB) Election & Instructions
DD-553	Deserter/Absentee Wanted by the Armed Forces
DD-2366	Montgomery GI Bill Act of 1984 (MGIB)
DD-2384-1	Notice of Basic Eligibility (NOBE)
SF-312	Classified Information Non-Disclosure Agreement (File here if no Unit PDR is maintained at unit)
---	Award Citation(s)
---	Administrative Discharge Board
---	Alcohol Incident Letter
---	Course Completion Letters
---	Designation Letters
---	Government Travel Card (Individually Billed Account) Setup Form (Mbr's initial submission only)
---	Government Travel Card Program Recommendation/Acceptance Statement (Enclosure (1) to COMDTINST 4600.14 (series)) (Mbr's initial submission only)
---	Medical or Physical Evaluation Board
---	Training and Qualification Letters
---	Non-Selection/Lock-in Letters
---	Letters/CG-3307 Removal/Relief for Cause
---	27-Point Screening Letter
---	Letter Authorizing Lateral Change in Rate
---	Officer Promotion Authorization List (OPAL)
---	Physical Evaluation Boards
---	Report of Civil Conviction(s)
---	Reserve Letter for 20 Years' Service
---	Reserve Points from Previous Service
---	Weight Compliance (Letter)

## Part 3: PMIS/JUMPS Documentation

(Top) CG-5209	USCG Leave and Earnings Statement (3 to 6 months only)
DD-2058CG	State of Legal Residence Certificate

### Part 3: PMIS/JUMPS Documentation (cont'd)

DD-2494	Tricare Active Duty Family Member Dental Plan Enrollment Election
DD-2494-1	Tricare Active Duty Family Member Dental Plan Enrollment Election (Supplemental Election)

### Part 4: Dependency & Support Documentation

(Top) CG-3853	Personal Effects Inventory & Disposition
CG-4170A	BAH/Dependency Form (Most recent only)
CG-5131	Standard Travel Order for Military Personnel (Most recent 2 PCSs only)
CG-5525	CG Reserve Assignment Request and Orders (9/97)
DD-1172	Application for Uniformed Services Identification & Privilege Card (Most recent only)
DD-1882	Survivor Benefit Plan Election Change
DD-1883	Survivor Benefit Plan Election Certificate
CGHSIC-2075	Family Subsistence Supplemental Allowance (FSSA) Application
CGHSIC-4700 (series)	Survivor Benefit Plan Election
CGPSC-2020D	Designation of Beneficiaries
CGPSC-2075	Family Subsistence Supplemental Allowance (FSSA) Application
CGPSC-4700 (series)	Survivor Benefit Plan Election
SGLV-8285	Request for Insurance (SGLI)
SGLV-8285A	Dependent Request for Insurance (SGLI)
SGLV-8286	SGLI Election and Certificate
SGLV-8286A	Dependent SGLI Election and Certificate
-----	Personnel Data Info File (PDIF)



## **UNIT PDR Structure**

### **Part 1: Training, Education, & Qualifications**

(Top) CG-3029A Record of Small Arms Training  
CG-3303C Performance Qualifications  
CG-5286 Class "A" Training Request (remove on receipt of orders to "A" school)

### **Part 2: Performance/Discipline**

(Top) CG-3307 Administrative Remarks  
---- Report(s) of Civil Arrest/Conviction

### **Part 3: Security Data**

(Top) CG-5274 Personnel Security Record  
SF-312 Classified Information Non-disclosure Agreement  
OPNAV 5510/413 Personnel Security Action Request  
CG-5588 Personnel Security Action Request (Rev. 6-98)

### **Part 4: General Administration**

(Top) --- Disclosure Log (see enclosures (6) and (7) for instructions)  
PDIF Personnel Data Information File (current only)  
CG-3788A-C Filed until reflected on CG-3306  
CG-4170A BAH/Dependency Form (most recent only)  
CG-5525 CG Reserve Assignment Request and Orders (9/97)  
CGPSC-2020D Designation of Beneficiaries  
SGLV-8286 SGLI Election and Certificate  
SGLV-8286A Dependent SGLI Election and Certificate  
---- Government Travel Card (Individually Billed Account) Setup Form  
(Mbr's initial submission only)  
---- Government Travel Card Program Recommendation/Acceptance  
Statement (Enclosure (1) to COMDTINST 4600.14 (series)  
(Mbr's initial submission only)



## **Access to and Disclosing PDR Documents**

1. The Coast Guard Freedom of Information and Privacy Acts Manual, COMDTINST M5260.3 (series), governs the release of any information contained in this records system. Grant access to PDR information only under these conditions:
  - a. On requests of the PDR's subject:
    - (1) To a representative(s) the PDR's subject has designated in writing;
    - (2) To any minor's parent or any person's legal guardian if a court of competent jurisdiction acting on behalf of that person has declared him or her incompetent;
  - b. To Coast Guard military members or Coast Guard or Department of Homeland Security employees who need PDR document(s) for official purposes;
  - c. When the Freedom of Information Act (FOIA) so requires;
  - d. To the Department of Veterans Affairs so it can determine a person's eligibility for VA benefits, and entitlement to use VA medical facilities;
  - e. For civil or criminal law enforcement purposes. A written request must specify the information requested, the law authorizing collection of the information, and the enforcement activity for which the record is sought. The head of the local, state, or federal agency must have signed the request. Consultation with the unit's Privacy Act Coordinator is required;
  - f. When an order or subpoena signed by a judge of a court of competent jurisdiction so directs. Consultation with a legal officer is required;
  - g. To consumer reporting agencies for debts owed to the Federal Government. Coordinate the release through the legal officer processing the debt collection;
  - h. To the Department of Health and Human Services' parent locator service;
  - i. When authorized, and military or government identification, state driver's license, or other similar documents establishes the identity of the person granted access. Complete the Disclosure Log in the member's PDR.
2. Handling FOIA and Privacy Act Inquiries: Refer to the Coast Guard Freedom of Information and Privacy Acts Manual, COMDTINST M5260.3 (series), before responding to any FOIA or Privacy Act information request.
3. Safeguarding PDRs. PDRs must have adequate administrative and physical security as prescribed in Chapter 7 of Coast Guard Freedom of Information and Privacy Acts Manual, COMDTINST M5260.3 (series).

Enclosure (6) to COMDTINST M1080.10F

- a. Store PDRs in cabinets or other containers attended during working hours and locked when unattended. A suitable container must protect the files comparably to a class 7110 file cabinet.
  - b. When destroying a PDR document is authorized, destruction must be so complete it prevents reconstructing or recovering the information. Destroy only by burning, shredding, or pulverizing.
4. Record on enclosure (7) the release or disclosure of all PDR system information or documents that fall under the FOIA or Privacy Act.
5. Releasing documents or information as authorized in this enclosure's subparagraphs 1.a. and 1.c. through 1.i. requires a record in the Disclosure Log.



**DISCLOSURE LOG**

<b>Name:</b>				
The individual subject of this record need not provide a reason (and none should be solicited) for requesting copies of documents from it or to review the record.				
DATE OF DISCLOSURE	PORTION OF RECORD DISCLOSED	PURPOSE OF DISCLOSURE (If other than member)	NAME AND ADDRESS OF PERSON OR AGENCY TO WHOM DISCLOSURE IS MADE	INITIALS OF RELEASING AUTHORITY

NOTE: Retain in PDR for 5 years after the last disclosure or for the life of the record, whichever is longer. Consult current records control schedules to determine the life of the record.

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## SEPARATION DOCUMENTS CHECKLIST

***Send these documents in complete packages only to CGPC (adm-3)***

NAME:	
SERVICING PERSONNEL OFFICE	SPO PHONE NUMBER:

### **Reenlistment**

- \_\_\_\_\_ Enlistment/Reenlistment Document, DD-4 (copy only)
- \_\_\_\_\_ Administrative Remarks, CG-3307 (copy only)

### **Discharge Without Immediate Reenlistment, Enlistment in CG Reserve, or Retirement**

- \_\_\_\_\_ Copy of Separation or Retirement Orders from Direct Access
- \_\_\_\_\_ Certificate of Release/Discharge From Active Duty (DD-214), Copies 2 and 8
- \_\_\_\_\_ Original Pre-Separation Counseling Checklist (DD-2648)
- \_\_\_\_\_ Original Administrative Remarks (CG-3307)
- \_\_\_\_\_ Annual Reserve Retirement Point Statement (CG-4175A)
- \_\_\_\_\_ Survivor Benefit Plan Election Change (DD-1883)\*
- \_\_\_\_\_ Survivor Benefit Plan Election Certificate (DD-1882)\*
- \_\_\_\_\_ Survivor Benefit Plan Election Certificate, PSC-4700 (copy only)

\* Applies only to USCGR members who made SBP election on completing 20 years' service and document is still in PDR.

### **Release From Active Duty (RELAD)**

- \_\_\_\_\_ Copy of Separation Orders from Direct Access
- \_\_\_\_\_ Certificate of Release/Discharge From Active Duty (DD-214), Copies 2 and 8
- \_\_\_\_\_ Original Pre-Separation Counseling Checklist (DD-2648)
- \_\_\_\_\_ Administrative Remarks (CG-3307) (copy only)

### **Discharge With Immediate Enlistment in CG Reserve**

- \_\_\_\_\_ Enlistment/Reenlistment Document, DD-4 (copy of reserve enlistment only)
- \_\_\_\_\_ Copy of Separation Orders from Direct Access
- \_\_\_\_\_ Certificate of Release/Discharge From Active Duty (DD-214), Copies 2 and 8
- \_\_\_\_\_ Original Pre-Separation Counseling Checklist (DD-2648)
- \_\_\_\_\_ Administrative Remarks, CG-3307 (copy only)

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**Medical/Dental Record Disposition Instructions**

Date: \_\_\_\_\_

From: \_\_\_\_\_  
Servicing Personnel Office

PDR Technician: \_\_\_\_\_

To: \_\_\_\_\_  
Health Record Custodian

Subj: \_\_\_\_\_  
Member name and EMPLID

1. Subject member's health record is to be forwarded as directed below in accordance with the Military Personnel Data Record (PDR) System, COMDTINST M1080.10 (series) and the Medical Manual, COMDTINST M6000.1 (series).

\_\_\_\_ VA Record Management Center  
Building 104  
4300 Goodfellow Blvd  
St Louis, MO 63115

**Note:** Copy of DD-214 provided. Place in record prior to mailing.

\_\_\_\_ Assigned SELRES unit \_\_\_\_\_  
Unit name

\_\_\_\_ Commander (rpm-2)  
CG Personnel Command  
Attn: **IRR**  
4200 Wilson Blvd, Suite 950  
Arlington, VA 22203

\_\_\_\_ Commander (adm-3)  
CG Personnel Command  
4200 Wilson Blvd, Suite 1100  
Arlington, VA 22203

For health record custodian use: Tracking information: \_\_\_\_\_

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## SUGGESTIONS TO IMPROVE THE MILITARY PERSONNEL DATA RECORD SYSTEM

<b>NAME:</b>	
<b>PERMANENT UNIT:</b>	<b>PHONE NUMBER:</b>
<b>SERVICING PERSONNEL OFFICE</b>	

• SUGGESTED IMPROVEMENT (S) •
• HEADQUARTERS ACTION ON SUGGESTION (S) •

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